



How Salesforce Marketing Cloud Works With Consent Management Framework



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salesforce

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 **GRIDMATE**

THE SPOT
by SERCANTE

FÍONTA

About me

Years of Salesforce Experience

11

Number of Salesforce Certifications

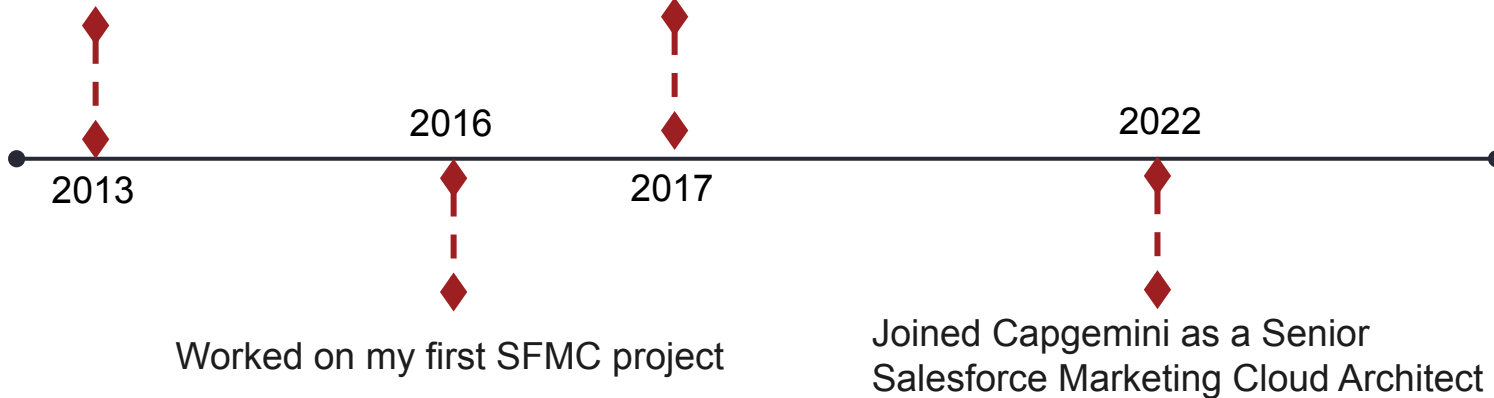
30+

Trailhead Star Ranger

3

Started as a Salesforce developer as end user

Became a Salesforce Architect Focus on SFMC/Cross Cloud project



Agenda



- What is Consent Management Framework and why you need it
- Different scenarios to apply consent objects
- Consent Data Model in SFMC
- Consent Dataflow
- How do you use the consent in SFMC
- Demo
- Q&A



What you will walk away with today

Know what Consent Management Framework is

How you can use it to manage consent

How you can leverage it in SFMC





What is Consent Management Framework and why you need it

Introduction to Salesforce Consent Management

What is Salesforce Consent Management Framework



A data model in Salesforce CRM that provides flexibility to capture and manage consent data



Track opt in/out for specific brands, communication purposes, channels and contact points



Consent management object records aren't counted toward your storage usage.

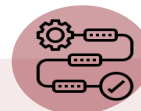
Why do you need it



Comply with data protection and privacy regulations



Give customers control over their own data



Streamline the data privacy management processes

Consent Management Data Model





SALESFORCE PLATFORM Privacy Consent Management

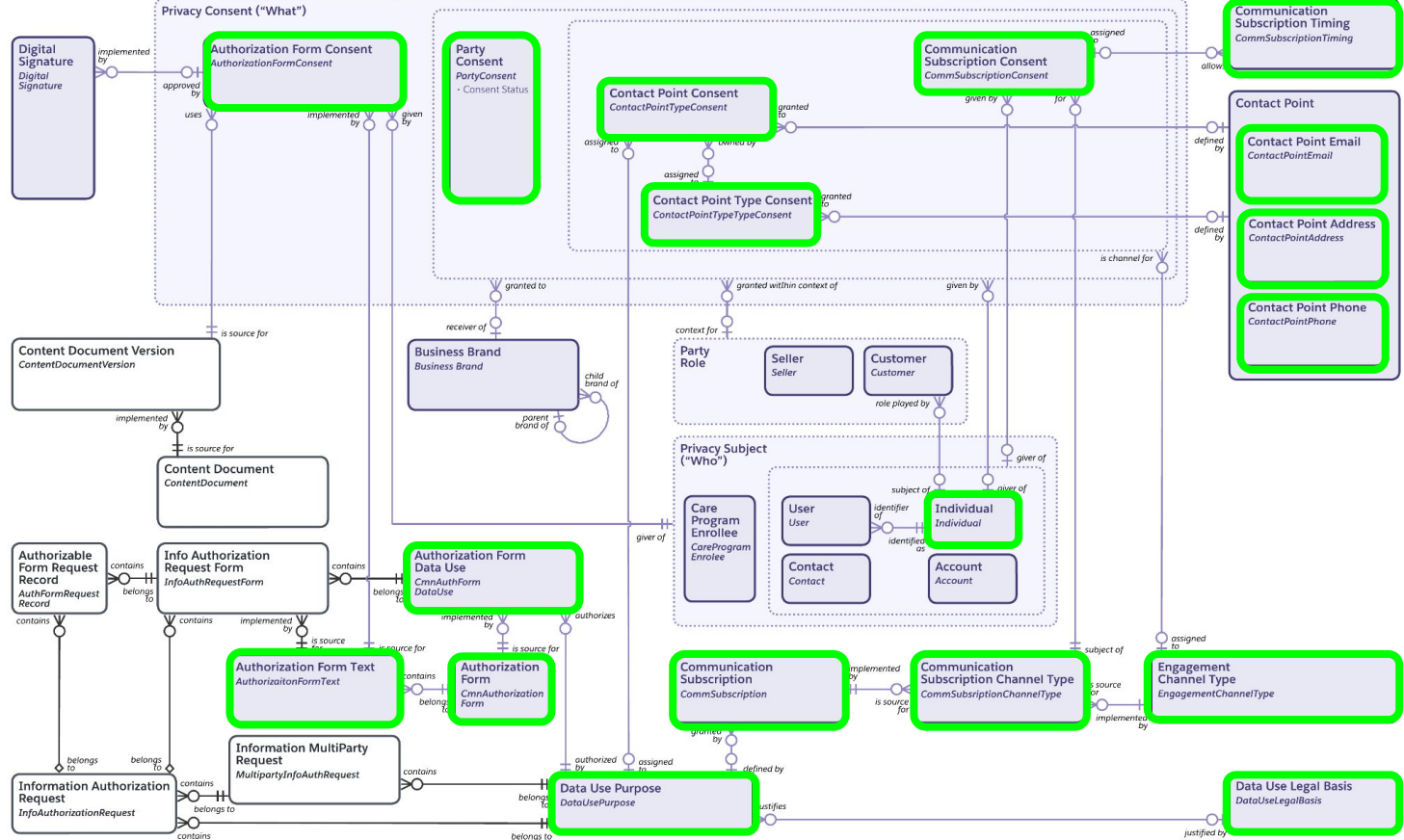
LEGEND:



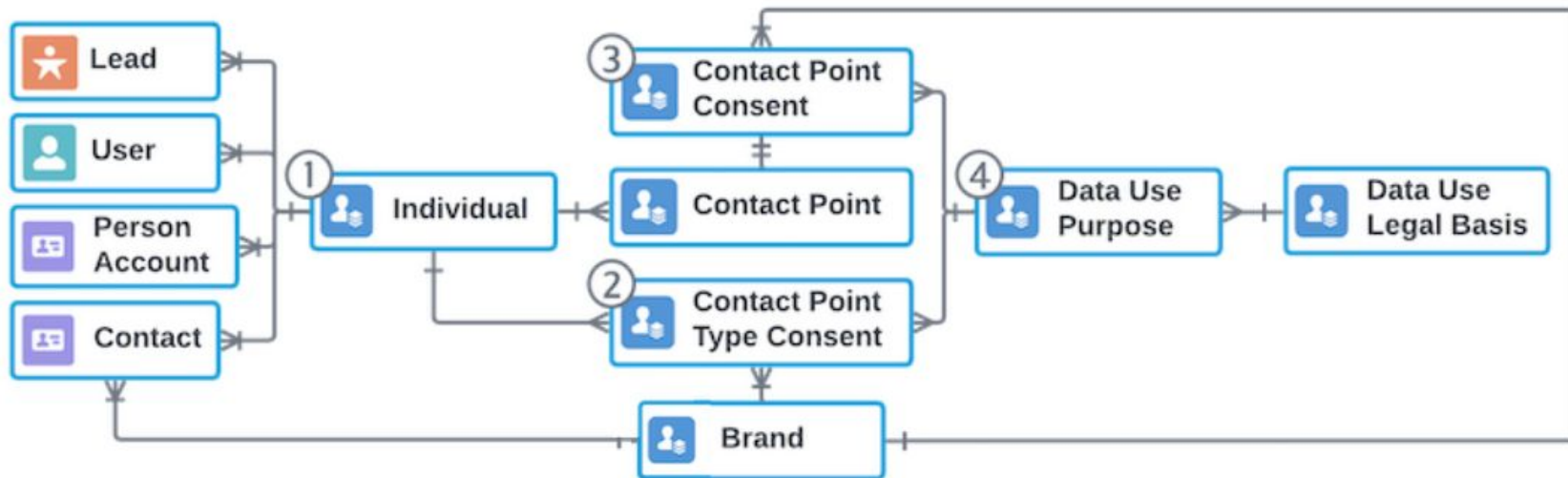
Detailed Salesforce notation for product data models can be found at: sfdc.co/erdnotation



Consent Objects



Consent Management Data Model



Consent is managed in the data model on **four levels**:

1. Global consent
2. Engagement channel consent
3. Contact point consent
4. Data use purpose



Scenarios to apply consent objects

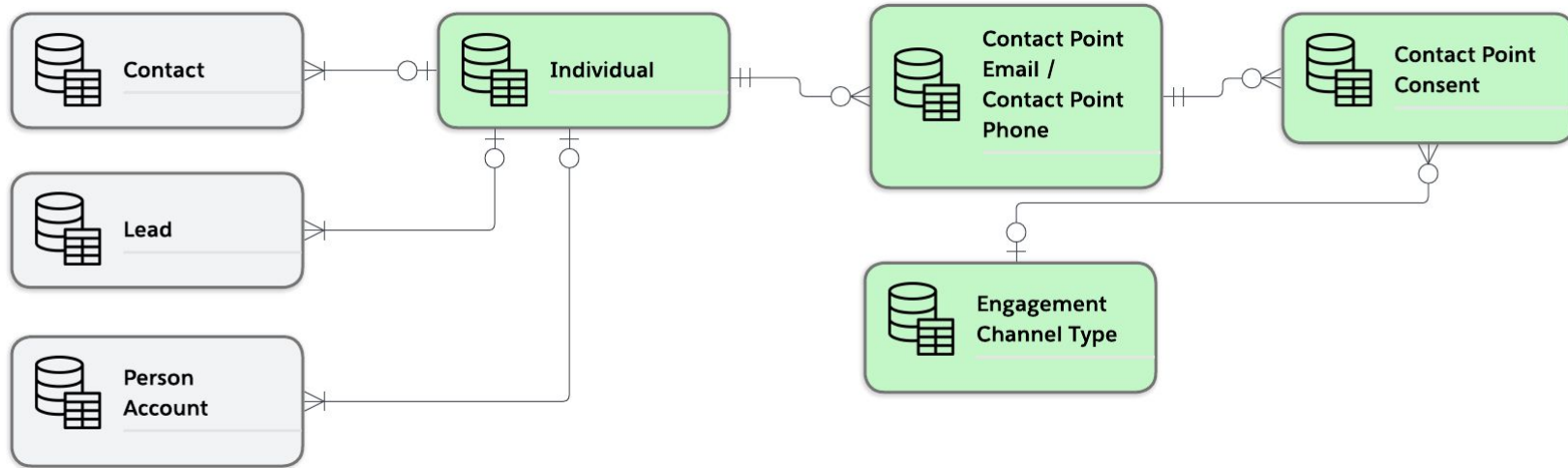




Scenario 1 - 1 Brand, 1 Contact point per Channel

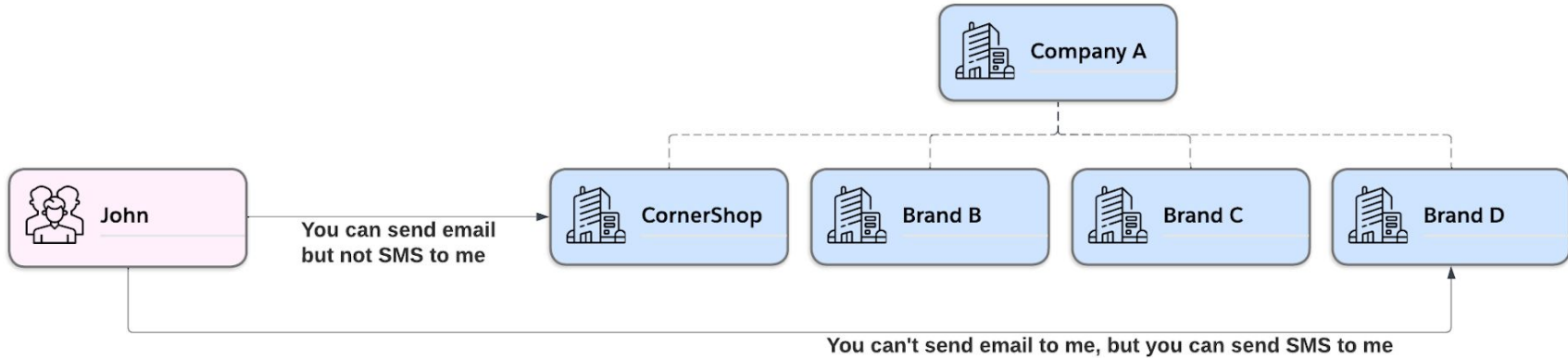


Scenario 1 - 1 Brand, 1 Contact point per Channel

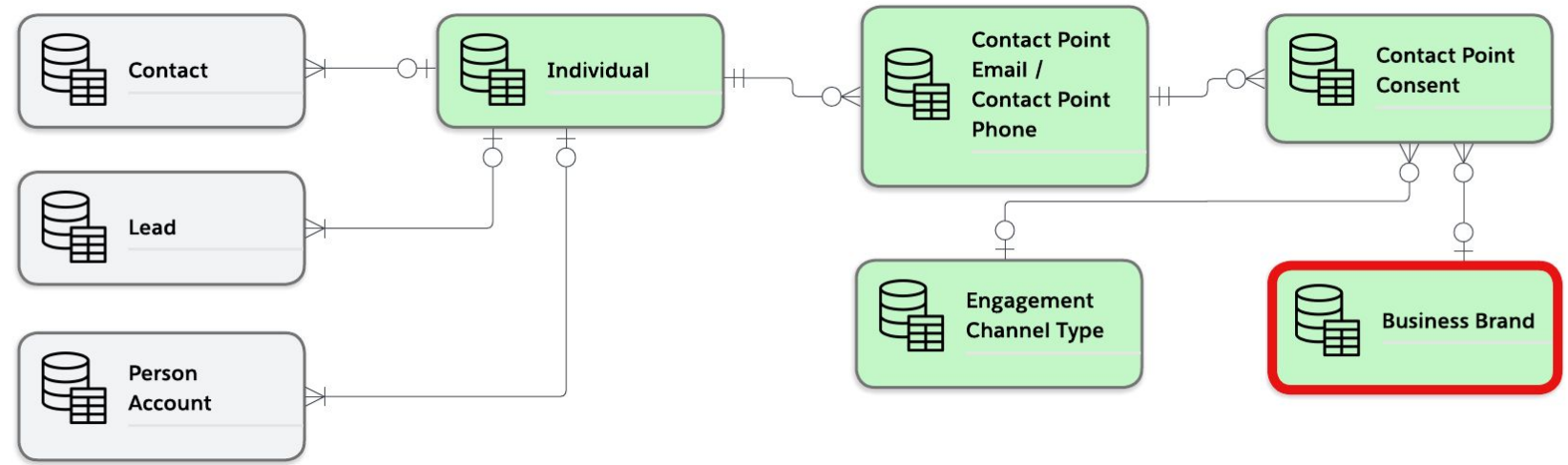




Scenario 2 - Multiple Brands, 1 Contact point per Channel



Scenario 2 - Multiple Brands, 1 Contact point per Channel





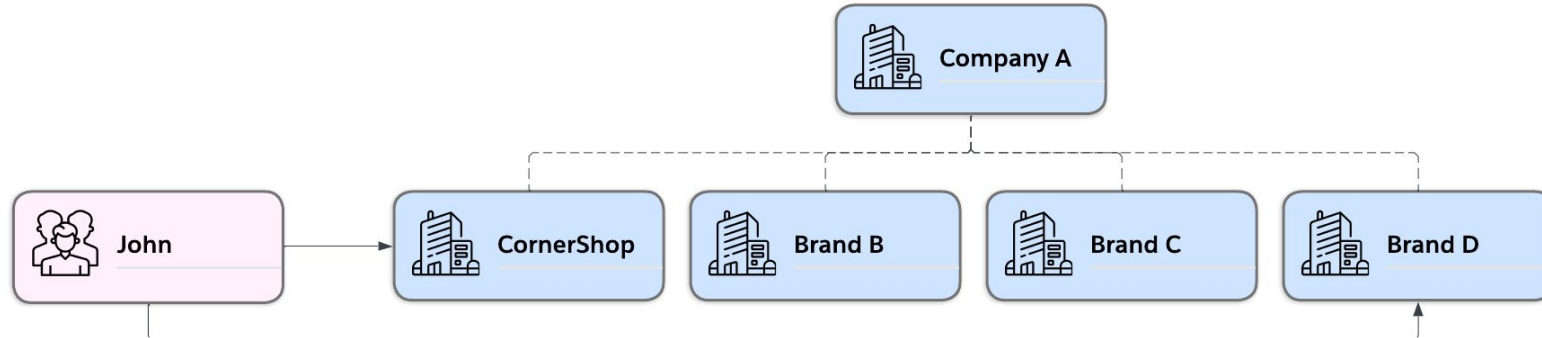
Customer



Company



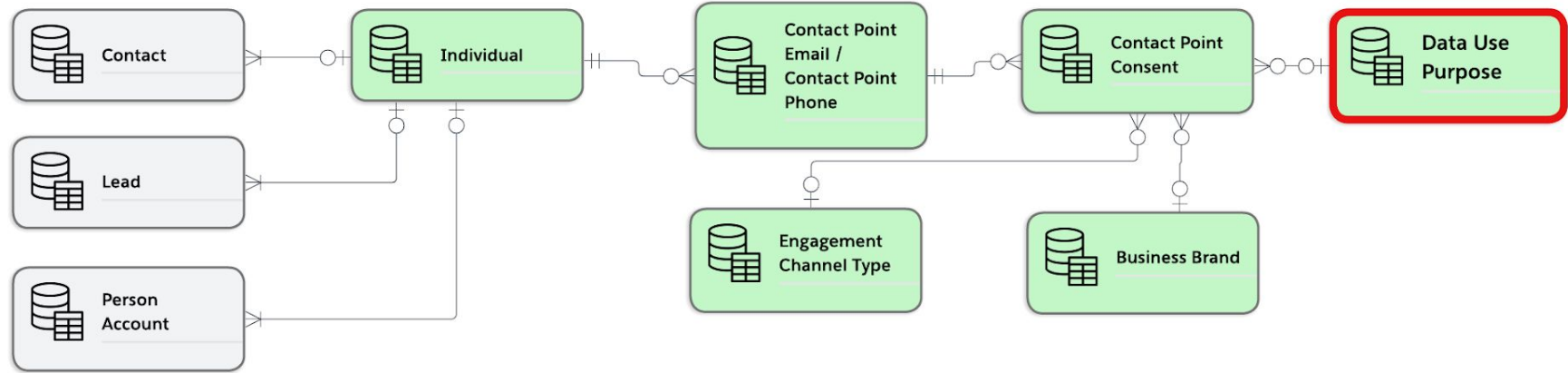
Scenario 3 - Multiple Brands, Multiple Contact points per Channel



John	Corner Shop			Brand D		
	Product Updates	Promotions & Offers	Offers from Partners	Product Updates	Promotions & Offers	Offers from Partners
Personal Email	√	√	×	√	√	√
Work Email	×	×	√	√	√	×
SMS	√	√	×	√	√	√
Phone	√	√	×	×	×	×

Scenario 3 -

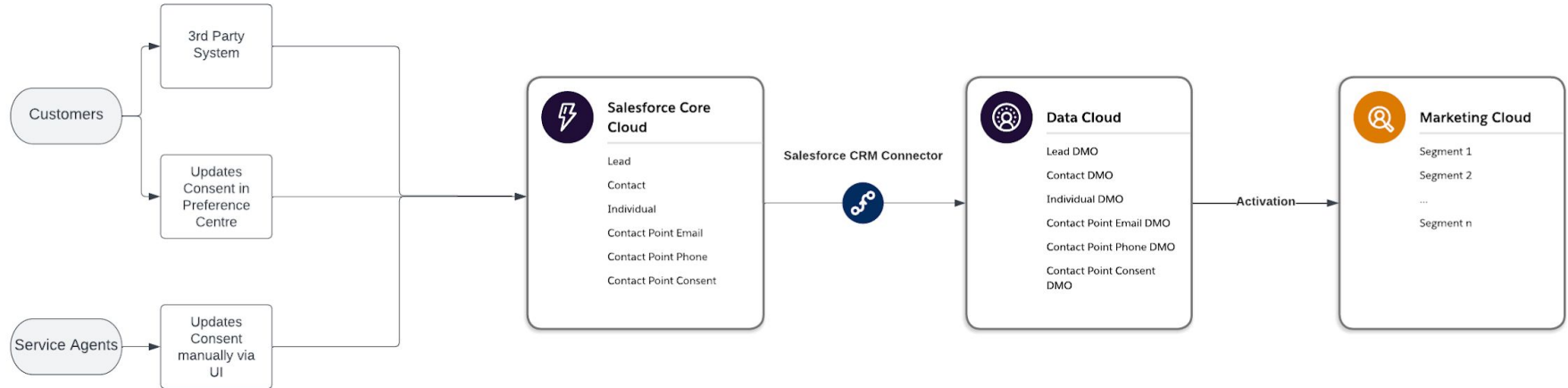
Multiple Brands, Multiple Contact points per Channel



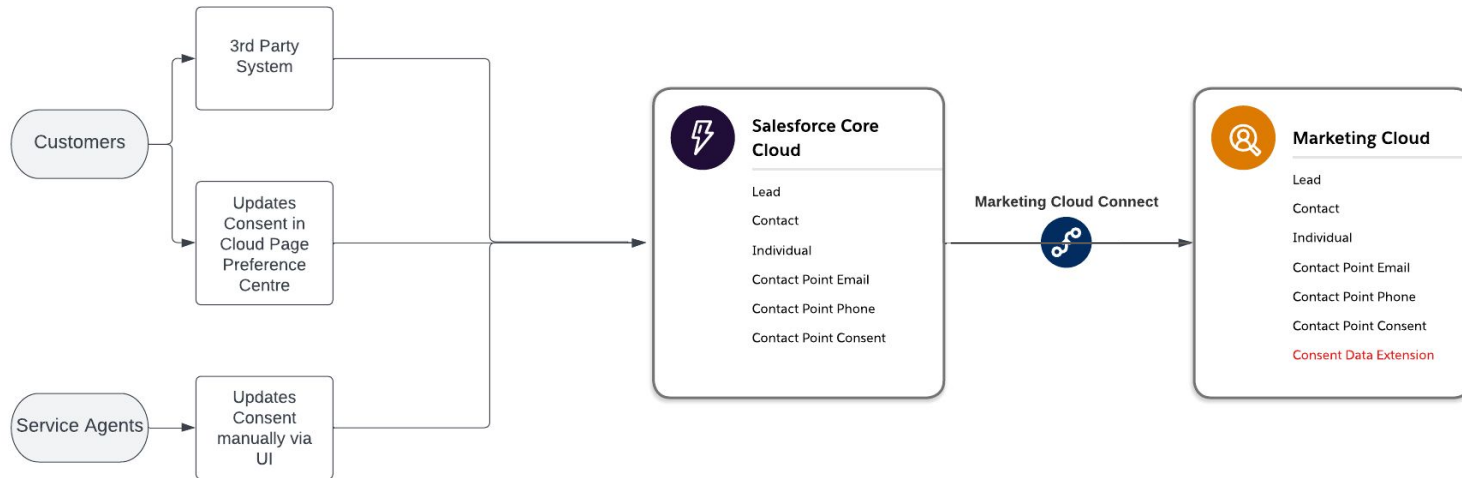


Different options to leverage consent data model

Option 1 - Sync to Data Cloud



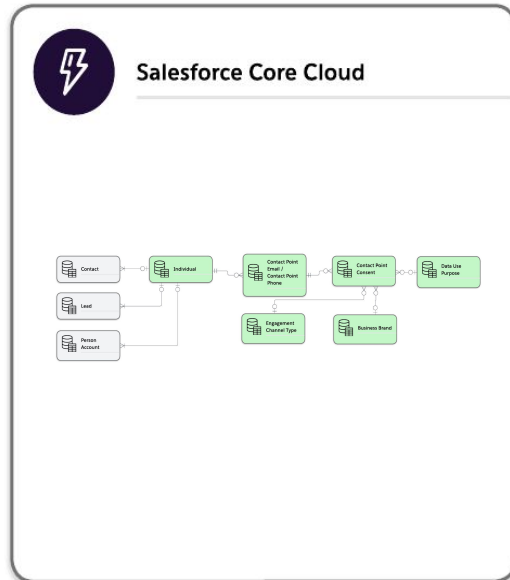
Option 2 - Sync to SFMC



Consent Data Model in SFMC

The background features a vibrant sunset with a color gradient from cyan to yellow. Below the sky are stylized purple mountains. A white wireframe grid is overlaid on the lower half of the image. On the right side, there is a faint, semi-transparent silhouette of a smartphone. In the bottom-left corner, there is a small illustration of green foliage with yellow flowers.

Data Model – SFMC Consent Data Extension



Transformation
(denormalization)

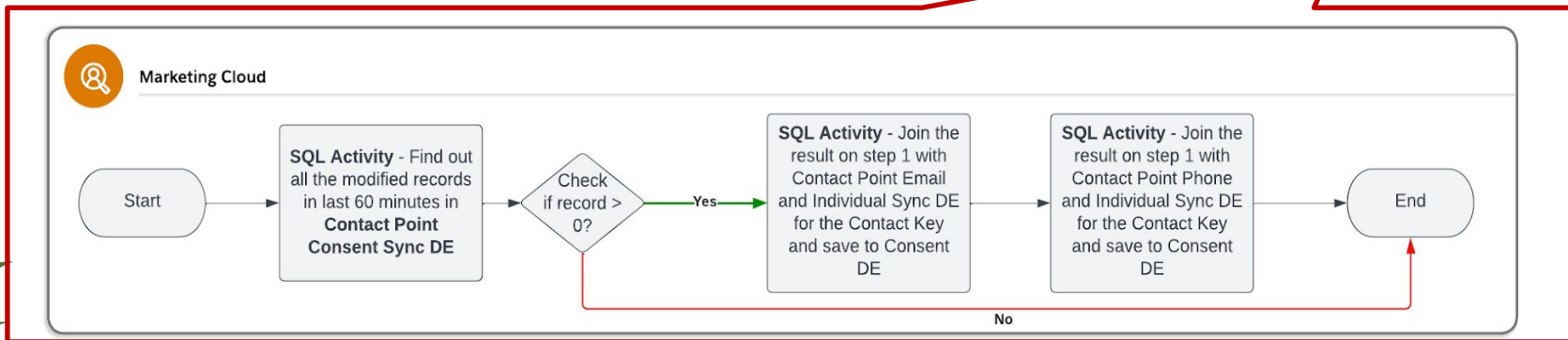
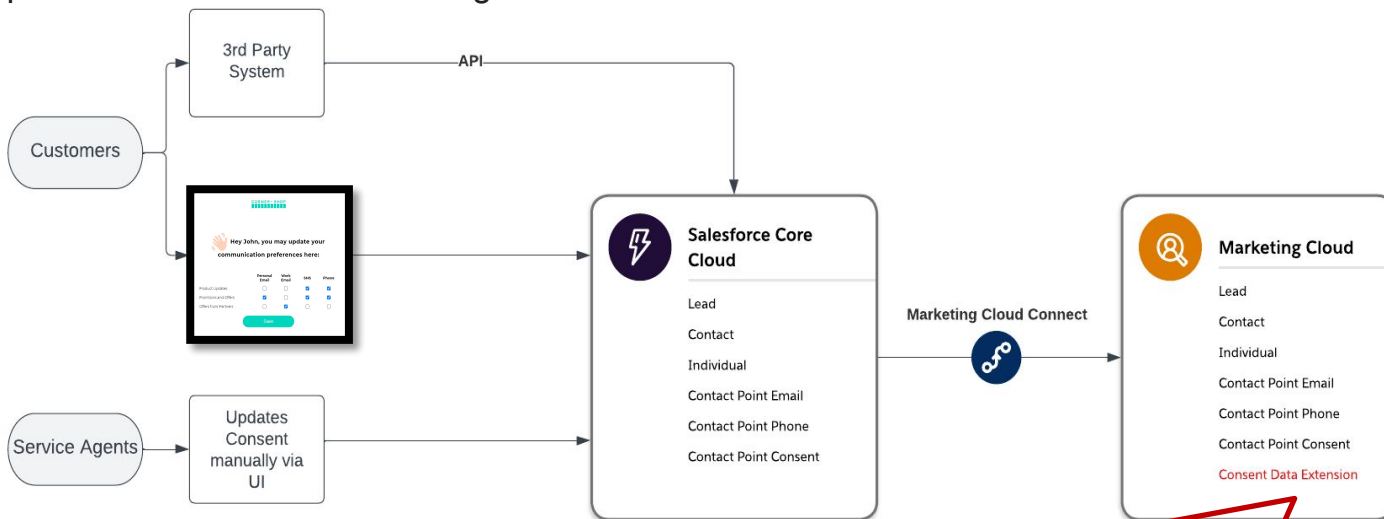


Consent Dataflow



Dataflow

How consent is passed to Salesforce Marketing Cloud

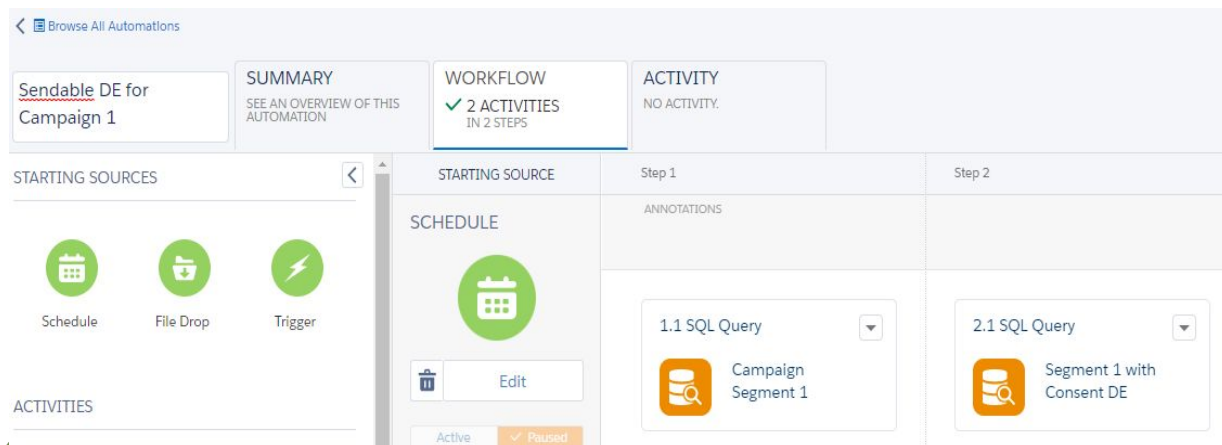


How do you use the consent in SFMC



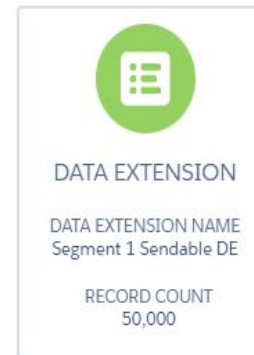
How do you leverage the Consent DE

Option 1 – Use SQL Query to prepare a Sendable Data extension (Recommended)



The screenshot shows the 'Sendable DE for Campaign 1' automation workflow. It consists of two steps, both using the 'SQL Query' activity. Step 1 is named 'Campaign Segment 1' and Step 2 is named 'Segment 1 with Consent DE'. The workflow is currently in a 'Paused' state.

Step	Activity Name	Target
1.1	SQL Query	Campaign Segment 1
2.1	SQL Query	Segment 1 with Consent DE



DATA EXTENSION

DATA EXTENSION NAME
Segment 1 Sendable DE

RECORD COUNT
50,000

How do you leverage the Consent DE

Option 2 – Use filtered Data Extension & Journey Builder Filter Contacts function

Filter Contacts

Optional: Drag and drop Contact attributes to build a filter that determines who enters the Journey.

⚠ At least one attribute in this filter criteria could produce multiple matching values. By default, Journey Builder uses the first matching value. You can use attribute-to-attribute comparison to determine the right match. [Tell Me More](#)


Attributes	Filter Criteria
Contact Data	Channel equal Email
	Channel equal SMS
	Opt In is True
	Business Brand equal Company A

DATA EXTENSION

DATA EXTENSION NAME
Customer

RECORD COUNT
50,000

FILTER CRITERIA
(Channel equal Email OR
Channel equal SMS) AND
Opt In is True AND Business
Brand equal Company A



Design assumptions



Salesforce CRM is the system of records for consents



Any updates to consents will happen in CRM first and subsequently to the other systems



Only relevant/selected objects from Consent Management framework are used in the design but not all objects

Demo



Q&A



Thank You!

